Digital Asset Wallet for Salesforce

Web3 Enabler

User Guide v0.1

Preface

Web3 Enabler Digital Asset Wallet for Salesforce is an app that integrates digital asset wallets with Salesforce Financial Services Cloud to allow financial planners to normalize crypto trading in their existing business processes.

Administrators or financial advisors do not need to be Web3 knowledgeable to use Digital Asset Wallet for Salesforce.

We urge Salesforce Administrators to read through this entire document at least twice. If you are new to Web3, some of the details may be unfamiliar to you. If you are experienced with Web3, you may find some of the simplifications we make in the interface shocking. We have focused on making the process as accessible as possible for individuals with all levels of blockchain and crypto understanding.

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Overview

This user guide outlines the processes to install, configure, and use Digital Asset Wallet for Salesforce.

This user guide provides the basic tools to understand and operate Digital Asset Wallet for Salesforce rather than advanced solutions.

Purpose

This is a resource for your organization's Salesforce administrators and users as well as financial advisors departments handling crypto Financial Holdings to understand the Digital Asset Wallet for Salesforce mechanics and network connection methods. Additionally, potential risks are noted and possible mitigation practices are suggested. This guide also

allows users to refresh on their roles or terminology as well as troubleshooting common errors that may arise.

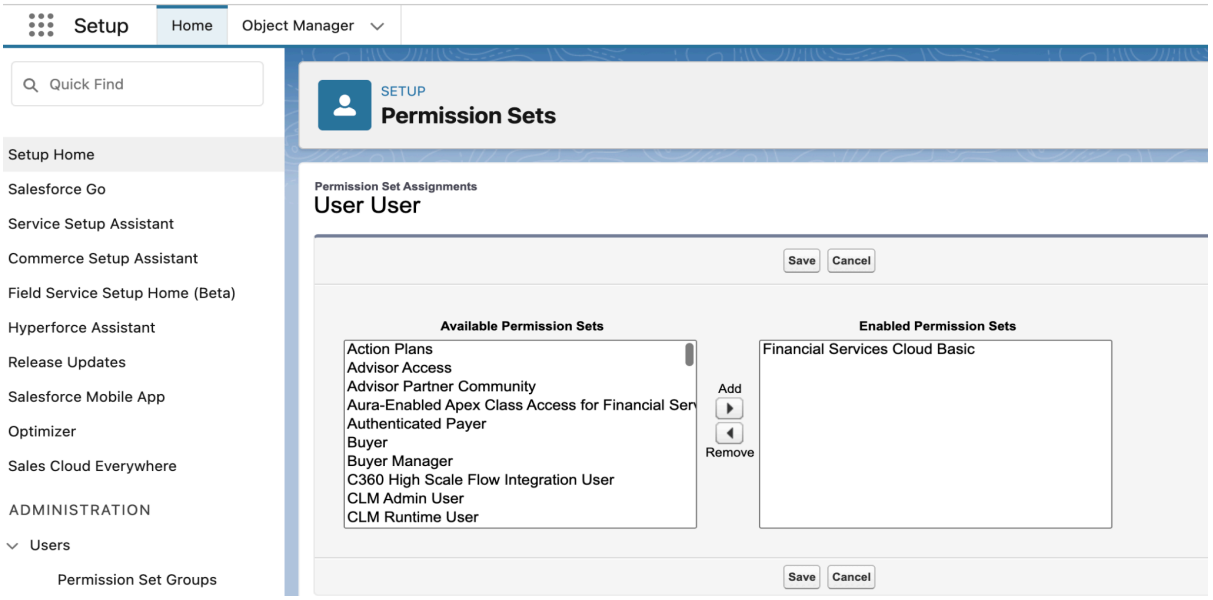
Quick Start Guide

Prerequisites

- A valid Financial Services Cloud license and installation in your Salesforce org
- Administrator access to the org

Installation

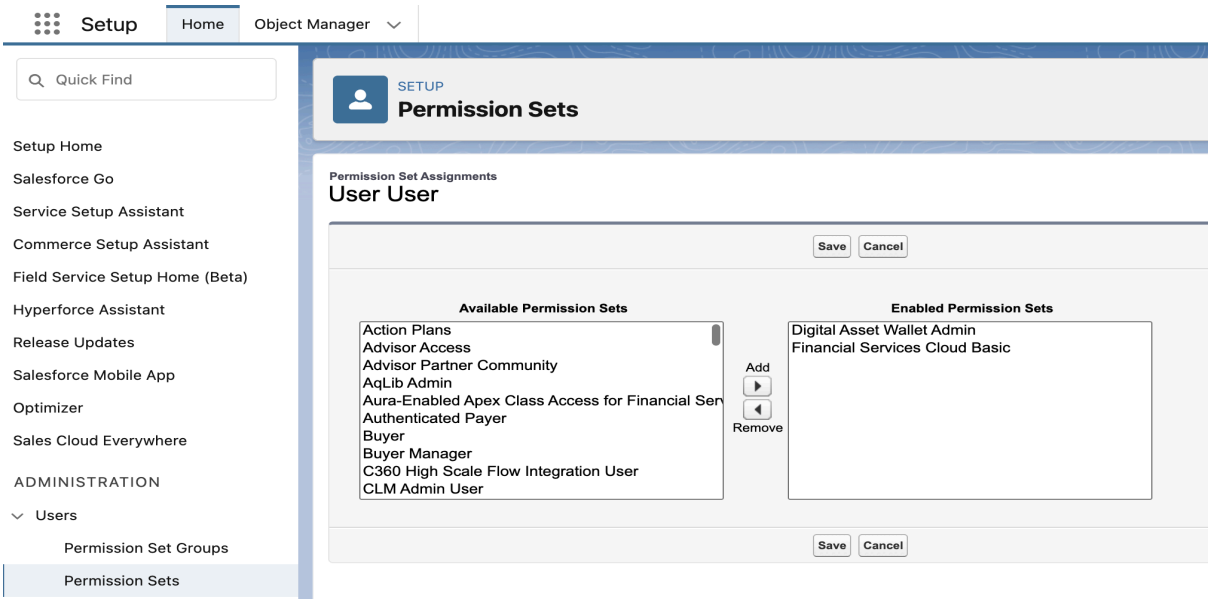
1. **Verify Financial Services Cloud Installation**
    - Ensure FSC is installed and enabled in your org. Contact your Salesforce administrator if confirmation is needed.
    - Check for FSC objects (e.g., Financial Account) in **Setup > Object Manager** to confirm installation.
    - **Note**: FSC must be installed separately prior to proceeding.
2. **Assign Financial Services Cloud Basic Permissions**
    - In Salesforce Setup, go to **Users > Permission Sets**.
    - Assign the **Financial_Services_Cloud_Basic** permission set to your user.
    - **Note**: This standard FSC permission set must be assigned via the Salesforce UI.



    - Go to Setup -> Users -> Assign the “Financial Services Cloud Basic: Permission Set
3. **Install the Digital Asset Wallet from AppExchange**
    - Navigate to the Salesforce AppExchange and search for "Digital Asset Wallet for Salesforce."

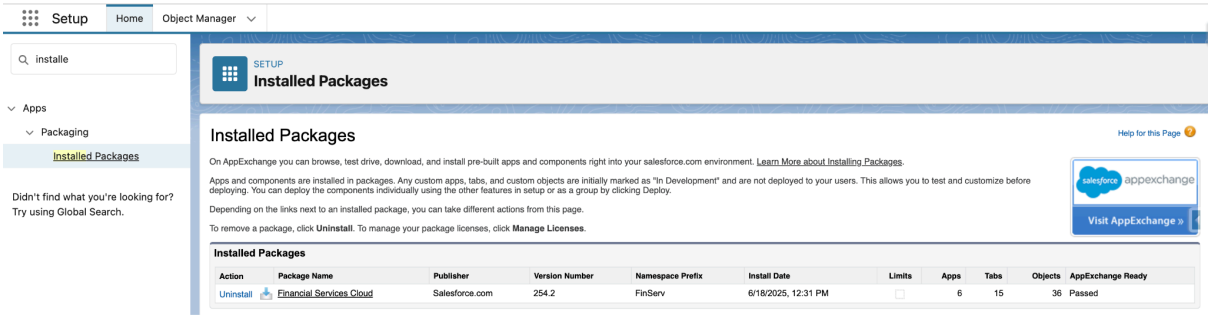
- Click **Get It Now**, select your org, and follow the installation wizard to complete the process.

4. **Assign Digital Asset Wallet Admin Permissions**
   - In Salesforce Setup, navigate to **Users > Permission Sets**.
   - Locate and assign the **Digital_Asset_Wallet_Admin** permission set to your user.
   - **Idea**: Assign this to all administrators managing the wallet for streamlined access.



Troubleshooting

- **If installation fails**:
  - Verify org limits and storage availability.
  - Confirm user permissions.
  - Review installation logs in AppExchange status or Salesforce Setup.
- **If FSC features are unavailable**:
  - Check package installation status in **Setup > Installed Packages**.
  - Ensure user permissions are correctly assigned.

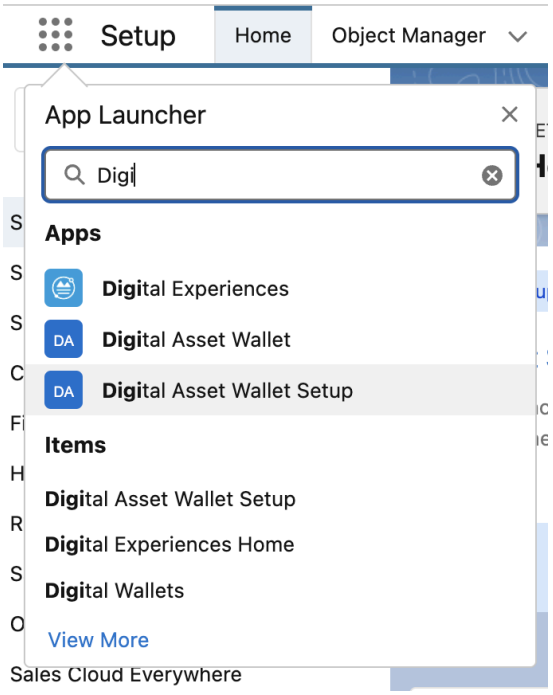


Administrators Guide

Post-Installation Setup and Authorization

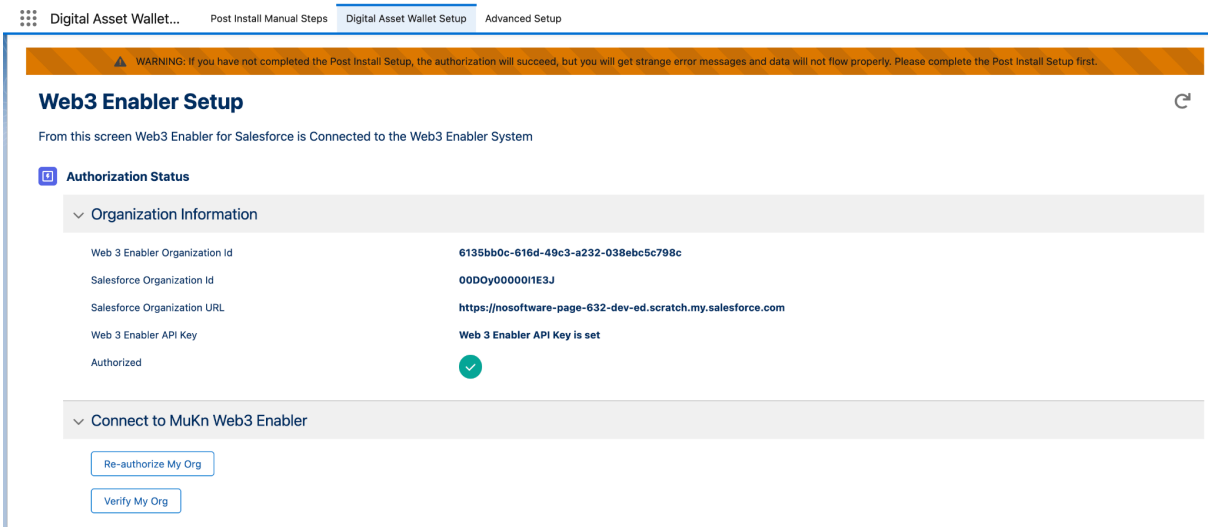
After installing the Digital Asset Wallet from the AppExchange, administrators must complete the post-installation setup to authorize the org and configure the integration user. Follow these steps by navigating to the app setup interface.

- **Step 1: Navigate to Digital Asset Wallet Setup**
  - Log in to your Salesforce org.
  - From the App Launcher, search for and select **Digital Asset Wallet Setup**.



- **Step 2: Access Post Install Manual Org Steps**
  - Within the **Digital Asset Wallet Setup** app, click the **Post Install Manual Steps** tab.
  - Proceed to complete all Steps to Setup and Configure your and Authorize with the Connected App.
- **Step 3: Authorize and Configure Permission Sets**
  - Follow the guide under **Web3 Enabler One Time Setup: Authorization and Authentication**.
  - Create a new Permission Set named "Web3 Enabler Integration Access" without a license:
    - In Salesforce Setup, go to **Users > Permission Sets**.
    - Click **New**, name it "Web3 Enabler Integration Access," and save.
  - Go to **Connected Apps Access**, add the MuKn Web3 CA connected app, and save.
  - Assign this permission set to your user.
  - 📝 **Note**: This step ensures proper communication with blockchain data.
- **Step 4: Create the Integration User**
  - Under **Step 2: Create the Integration User**, create a Salesforce Integration User:
    - In Salesforce Setup, go to **Users > Users**.
    - Click **New User**, enter reasonable names and logins (e.g., integration.user@yourdomain.com), and assign the "Salesforce Integration" profile.
    - Use an email you can monitor and enable the user.
  - Assign the "Web3 Enabler Integration Access" permission set to this user.
  - 💡 **Idea**: This user provides a clear audit trail for sensitive Web3 data.
- **Step 5: Authorize the Org**

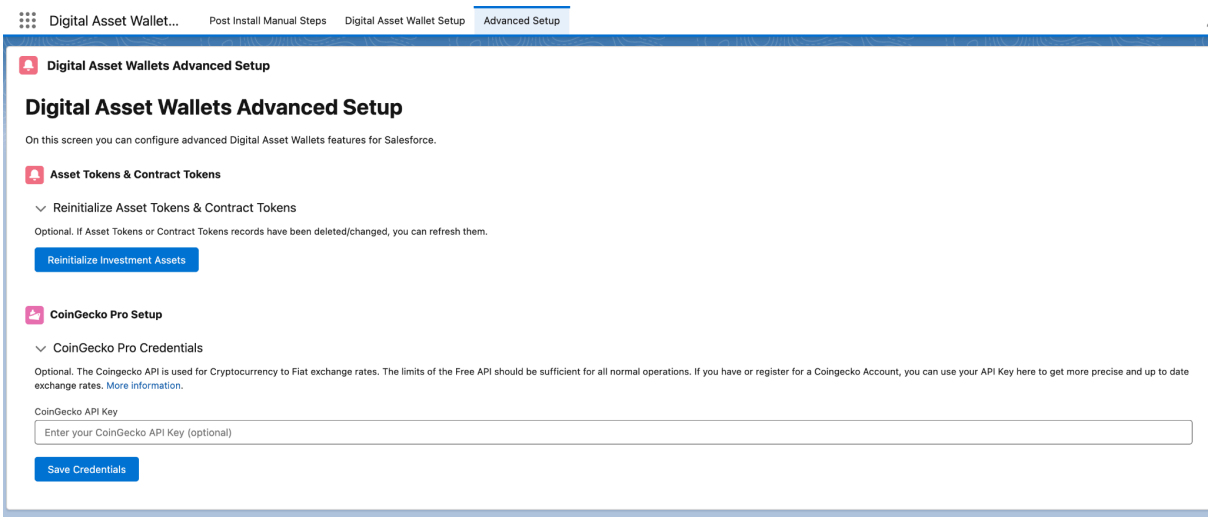
- Return to the **Post Install Manual Steps** tab and click **Authorize My Org**.
- Use the Integration User's credentials (username/password) to log in and authorize.
- After authorization, refresh the **Web3 Enabler Setup** tab to verify success.



Digital Asset Wallet User

This section is designed for end users, such as financial advisors and planners, to set up and utilize the Digital Asset Wallet within the Salesforce Financial Services Cloud environment. It provides step-by-step instructions to access the app, configure it for individual use, and explore its key features for managing digital assets and transactions.

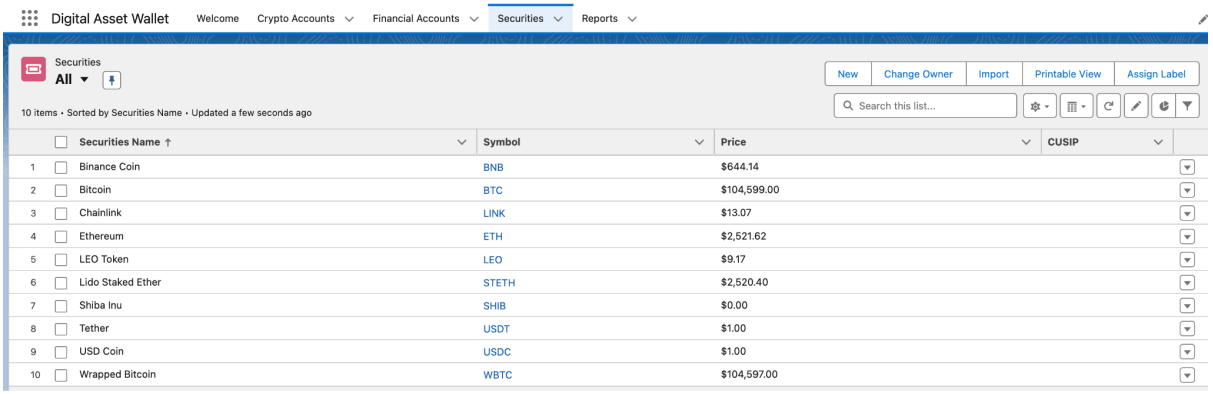
Initializing Crypto Investment Assets



- If available, a paid API Key can be obtained from **Coingecko** to get premium usage of their Pricing API in order to get higher usage of of to date asset pricing and market pricing for all initialized assets and Crypto Holdings.

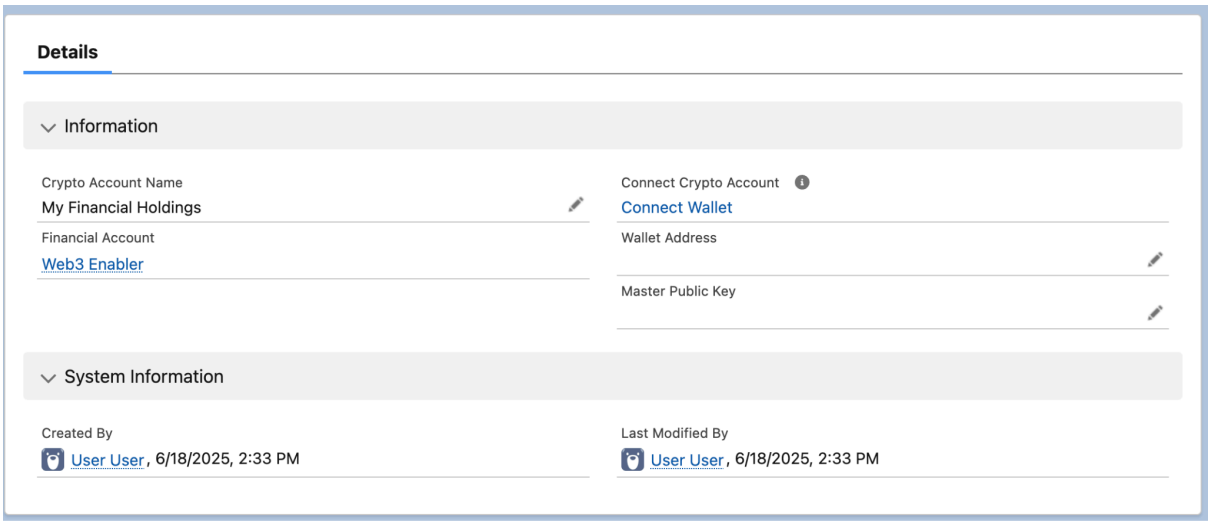
Using Digital Asset Wallet App

- Navigate to the **Digital Asset Wallet** app to view the initialized Crypto Assets as Financial Securities utilizing the native FSC objects.



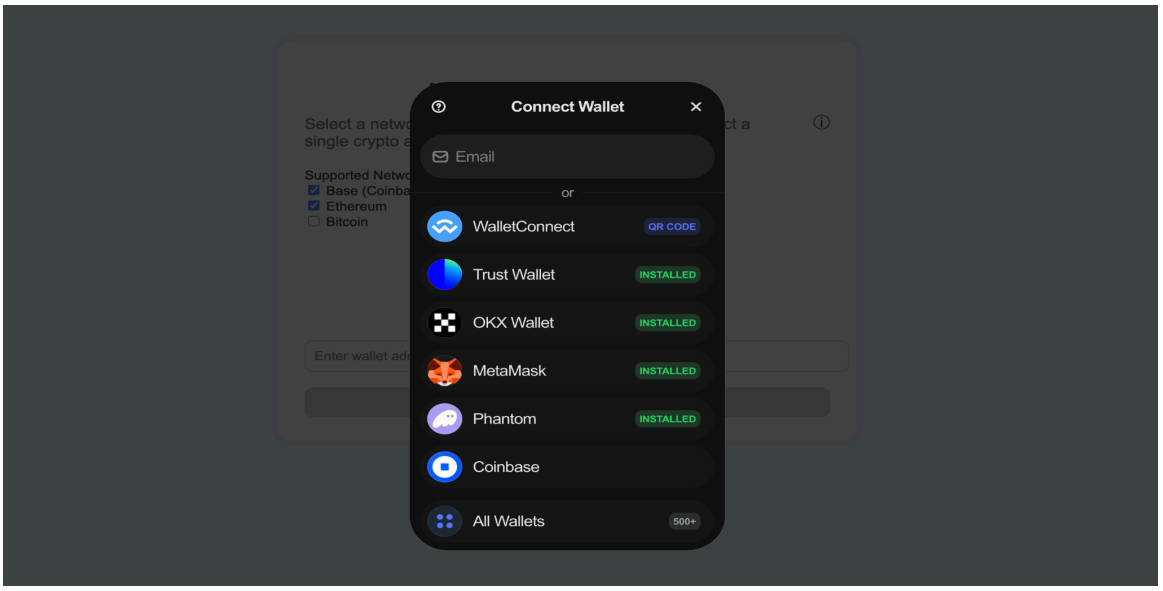
Creating Crypto Account

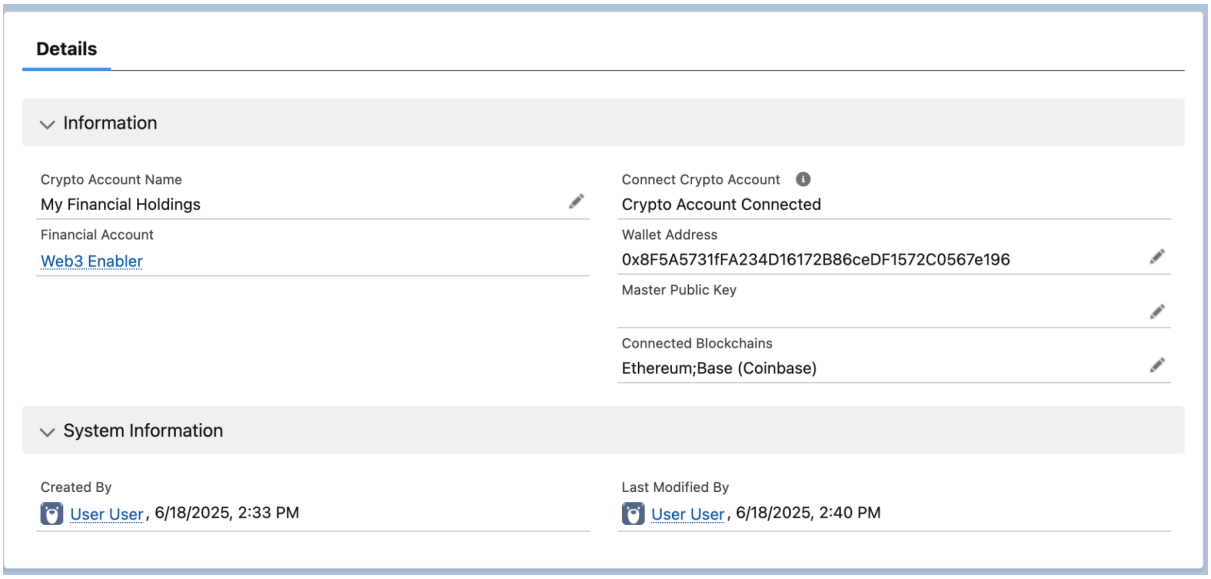
- A single **Crypto Account** is a place that holds a Blockchain Connection to a specific wallet or Address to manage Digital Assets for various wallets and networks.
- Wallets can be connected through EVM style Wallets and UTXO Wallets such as Bitcoin, Doge, Litecoin, and Dash.
- When connecting a single EVM Wallet it is connected with a single account address such as a Metemask Address or any of your favorite EVM compatible Crypto wallets.
- UTXO Wallets are similar as they use a Mater Public Key Address which is used to derive UTXO Addresses with a **Herilistically Deterministic (HD)** Wallet.
    - A **Heuristically Deterministic (HD)** wallet is a cryptocurrency wallet that generates a hierarchical tree of private and public keys from a single seed phrase, enabling secure, organized key management and simplified backups.
- Crypto Accounts are related to a **Financial Account** using FSC so that many different Crypto Wallets and networks can be rolled up to manage all Assets and Financial Holdings.



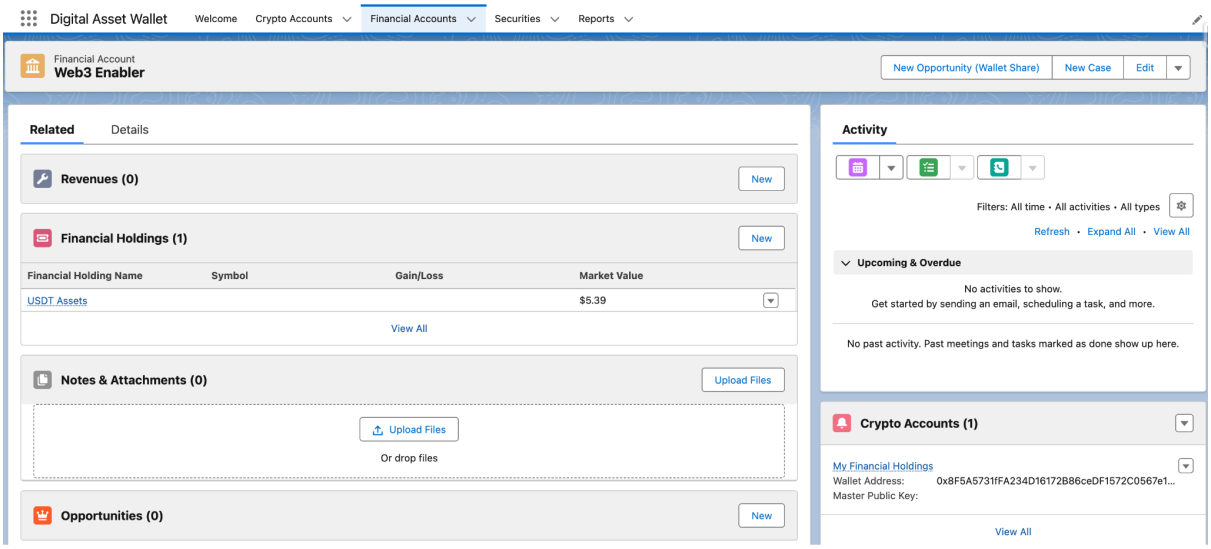
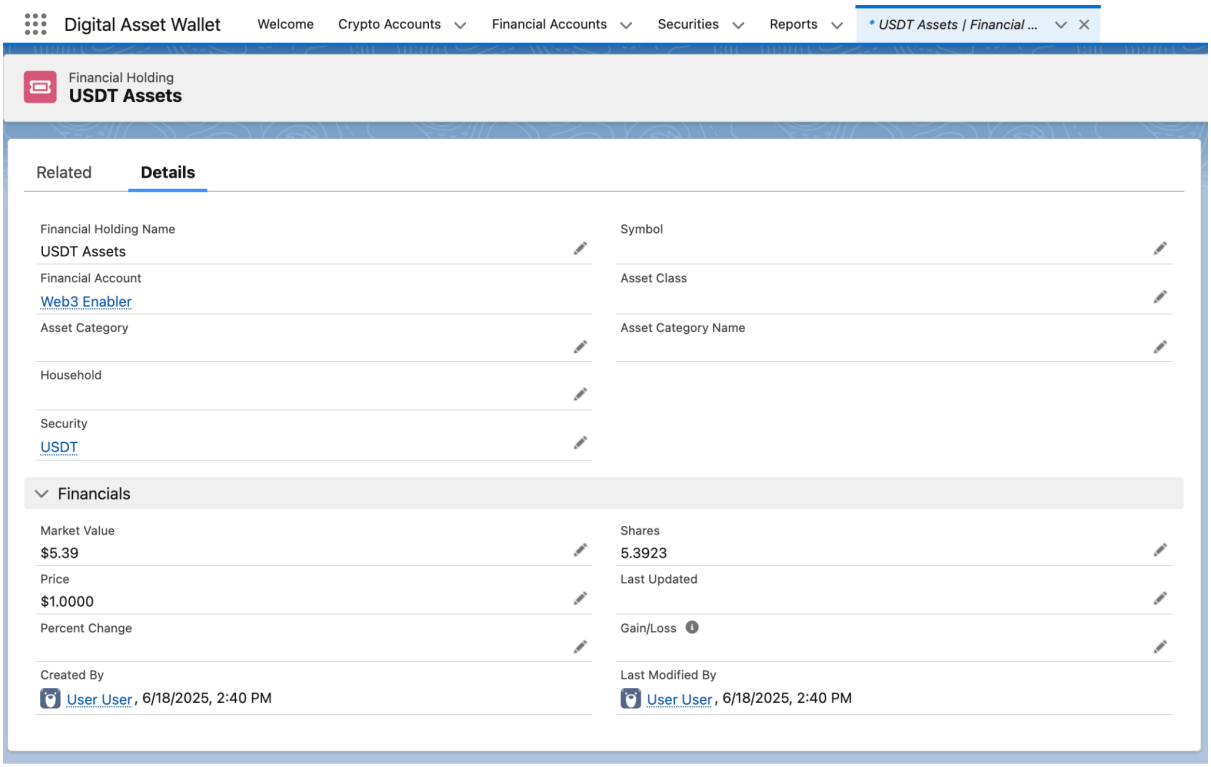
Connecting Crypto Account

- Connecting a Wallet to a **Crypto Account** is easy with Wallet Connect or by manually entering your wallet Address or Master Public Key. Once connected any Digital Assets in all **Crypto Accounts** will roll up to reflect all assets for all different associated wallets and types.
- As soon as a Crypto Account is successfully connected with your preferred wallet, all valid Assets and Networks that are configured in Salesforce will be pulled and updated with the current Market Price for each unique asset as a FSC Financial Holding object related to the specific Financial Account.





View all Financial Holdings

- Navigate to the specific Financial Account associated with your connected Crypto Account.
- Direct to the **Related** Tab for the Financial Account and all assets will be rolled up into **Financial Holding** objects for all connected wallets for the Account.

- All **Financial Holdings** will be created with the current Asset Price and Market Value for the particular Holding.